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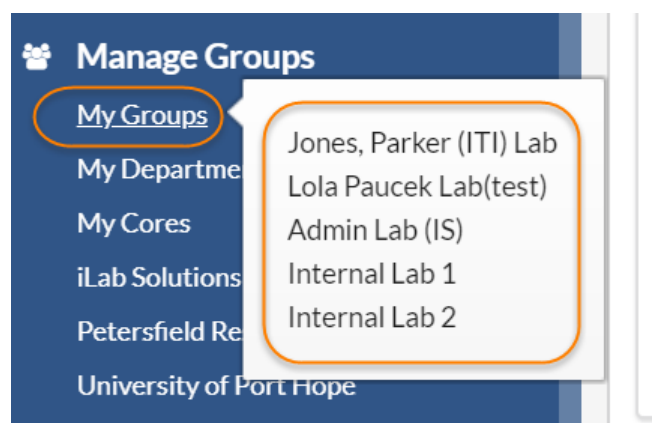
Overview of Managing a Group

Roles: PIs, Lab/Group Manager

The Lab/Group interface is the central hub for PIs and Lab/Group Managers to manage the Lab/Group members, access to funding, monitor budget and modify various settings. In iLab, every user must be a member of at least one Lab/Group to be able to order services and make reservations.

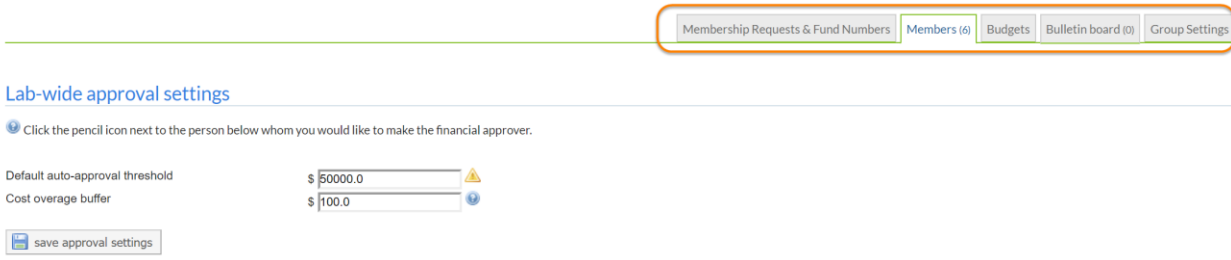
Accessing your Lab/Group

To access your group, either hover over the "my groups" link on the left-side navigation and then select the lab from the pop-up, or click on the "my groups" link and then select the lab from the list on the next page (if you have only one group, clicking the link will take you straight there):



Navigating your Lab/Group

The functions of your group in iLab are organized in various tabs: Membership Requests & Worktags, Members, Budgets, Bulletin Board, and Group Settings



- **Membership Requests & Worktags:** Accept/Reject group membership request and manage assignment of funding to group members
- **Members:** Manage group members and automatic approval levels (across lab and per member)
- **Budgets:** Receive alerts based on member of core-level spending
- **Bulletin Board:** Post messages within your group
- **Group Settings:** Modify various group settings

Also be aware of various functions accessed from the left-hand navigation that may be helpful to you as a PI or Lab/Group Manager:

- **View Requests:** Filter and view all service requests placed by members of your group.
- **Invoices:** Review all invoices for service requests and reservations made by your group.
- **Reporting:** Generate reports for iLab activity of your group.

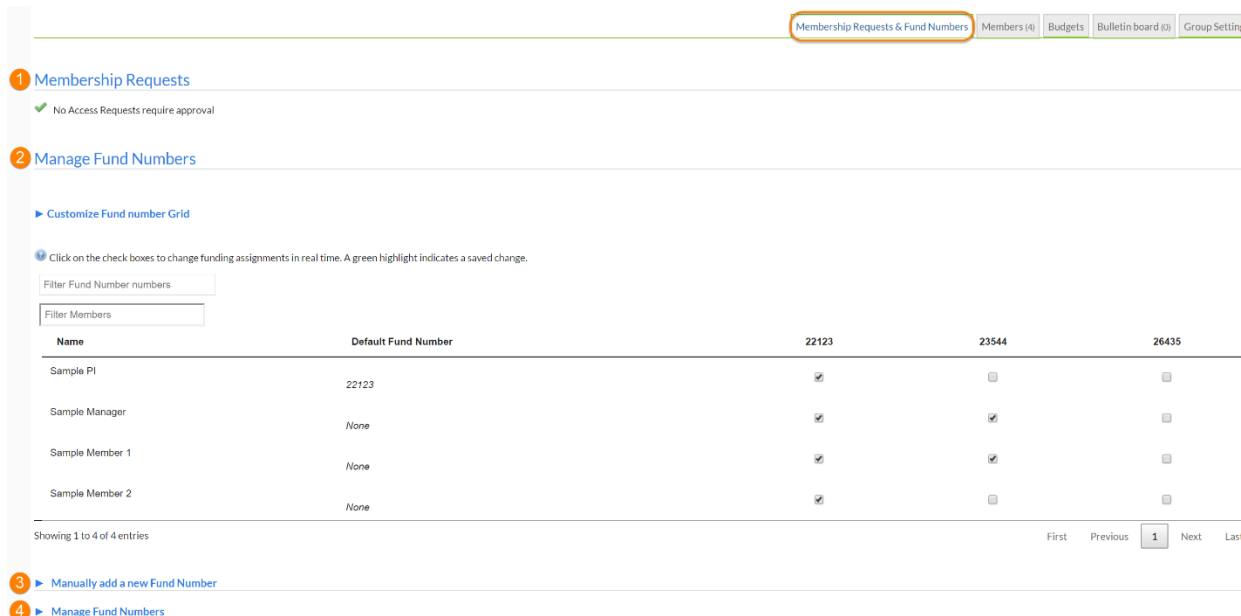
Membership Requests & Fund Strings (Worktags)

Roles: PIs, Lab/Group Manager

The Membership Requests & Fund Strings tab provides tools for the PI or group manager to approve group memberships, manage access to funds and to add additional Worktags.

Membership Requests & Fund String Tab Layout

The layout of the *Membership Requests & Fund Strings* tab is illustrated below:

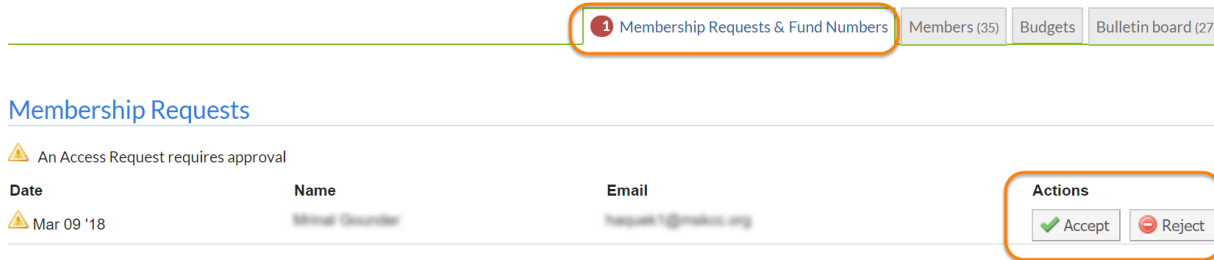


Name	Default Fund Number	22123	23544	26435
Sample PI	22123	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sample Manager	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 1	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 2	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Membership Requests:** Accept or decline users that are looking to become members of your lab.
- Manage Worktags:** The main purpose of this interface is to assign/unassign access to funds for each of your group members (the "*Fund Grid*"). It also provides various tools to create a custom selection of Funds to display, and to quickly filter the worktags visible by Fund or group member.
- Manually add a new Worktag:** This interface lets you add additional funds to your research group.
- Manage Worktags:** Hide or remove funds from your lab.

Accept/Decline Membership Requests

During the registration process, users select the PI they work with. When a user selects you as their PI, you will see a membership request at the top of the page.



The screenshot shows a navigation bar with the following items: **Membership Requests & Fund Numbers** (highlighted with an orange box), Members (35), Budgets, and Bulletin board (27). Below the navigation bar is a section titled "Membership Requests" with a warning icon and the text "An Access Request requires approval". A table displays a membership request with the following details:

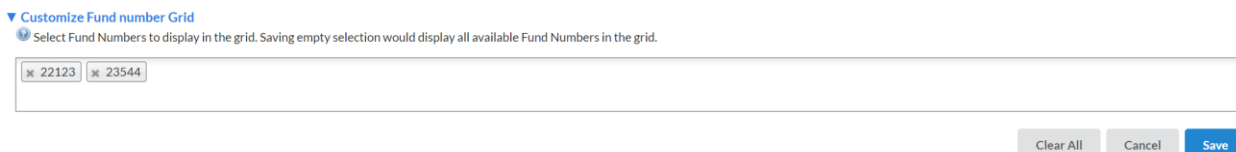
Date	Name	Email	Actions
Mar 09 '18	Shirah Gouder	hgouder@med.virginia.edu	<input type="button" value="Accept"/> <input type="button" value="Reject"/>

You can choose to 'Accept' or 'Reject' the membership request. If accepted, the user will be added to your group/lab. You will then be able to assign funding to your user.

Note that you can also manually add members to your lab, provided they already are registered with iLab.

Customize the Fund Grid

Groups with many different Funds may find it helpful to set up a specific selection of funds to display on the *Fund Grid*. To accomplish this, expand the *Customize Worktag Grid* by clicking on the title:




The screenshot shows the "Customize Fund number Grid" interface. It includes a title "Customize Fund number Grid" and a sub-instruction: "Select Fund Numbers to display in the grid. Saving empty selection would display all available Fund Numbers in the grid." Below this is a text input field containing two selected fund numbers: "22123" and "23544". At the bottom right of the interface are three buttons: "Clear All", "Cancel", and "Save".

Click in the fund selection box in the middle and type (part of) of Fund name and then select it from the drop-down. It will be added to the list. Individual Funds can be removed from the list by clicking on the "X" to their left, or you can clear all funds with the "Clear All" button. Once you have all the desired funds added, click on "Save" to save the list and only display the selected Funds in the *Fund Grid*.

Filter Worktags and Members


To quickly view a specific fund or group member, you can use *Filter Worktag* and *Filter Members* boxes. Type (part of) a worktag or member name in the corresponding box, and the *Fund Grid* will only show matching entries.

 Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Assign Worktags

Adding or removing worktags for each of the lab members can be done in the *Manage Worktags* section of the tab. To assign a worktag to a user, click the check box of the worktag in the row of the user you wish to assign to. To remove a worktag, click on the check box to remove the check.

Manage Fund Numbers

 Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.

Name	Default Fund Number	22123	23544
Sample PI	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Manager	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sample Member 1	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sample Member 2	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Default worktags can be assigned for each group member by clicking on the "Default Worktag" column for that user. If a default worktag is assigned, this will be used for every request the member makes unless they actively select a different fund.

Manually Add a Fund String (Worktag)

To add a new Worktag, fill in the required fields, and click *Add*.

- Company ID (REQUIRED) - Up to 7 characters
- Cost Center (REQUIRED) - Up to 10 characters

One of the 4 parts (Gift, Grant, Designated, and Project) are required:

1. Gift (Optional) - 2-digit prefix (GF), 6-digit number
- OR
2. Grant (Optional) - 2-digit prefix (GR), 6-digit number
- OR
3. Designated (Optional) - 2-digit prefix (DN), 6-digit number
- OR
4. Project (Optional) - 2-digit prefix (PJ), 5-digit number

- Program (Optional) - 2-digit prefix (PG), 5-digit number
- Function (REQUIRED) - 2-digit prefix (FN), 3-digit number
- Activity (Optional) - 2-digit prefix (AC), 5-digit number
- Assignee (Optional) - Up to 9 digits
- Internal Reference (Optional) - Up to 27 characters

The screen will refresh and the worktag will be added to the fund grid. The fund is now available to be assigned to group members.

Manage Fund Numbers

Click on the check boxes to change funding assignments in real time. A green highlight indicates a saved change.


Name	Default Fund Number	22123	23544	26435
Sample PI	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sample Manager	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 1	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Member 2	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

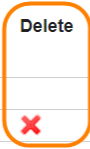
Manage Worktags

There may be times when a valid worktag should no longer be used. The interface will show a red X to allow removal of the fund.

Note that only worktags without current charges associated with them can be hidden or deleted.

▼ Manage Fund Numbers

 Only Fund Numbers with no member associations can be edited/hidden/deleted. Remove all member associations above to manage a Fund Number. You can rename a Fund Number only if it hasn't been used for ordering.

Fund Number	Status	Delete
22123	active	
23544	active	
26435	active	

Members

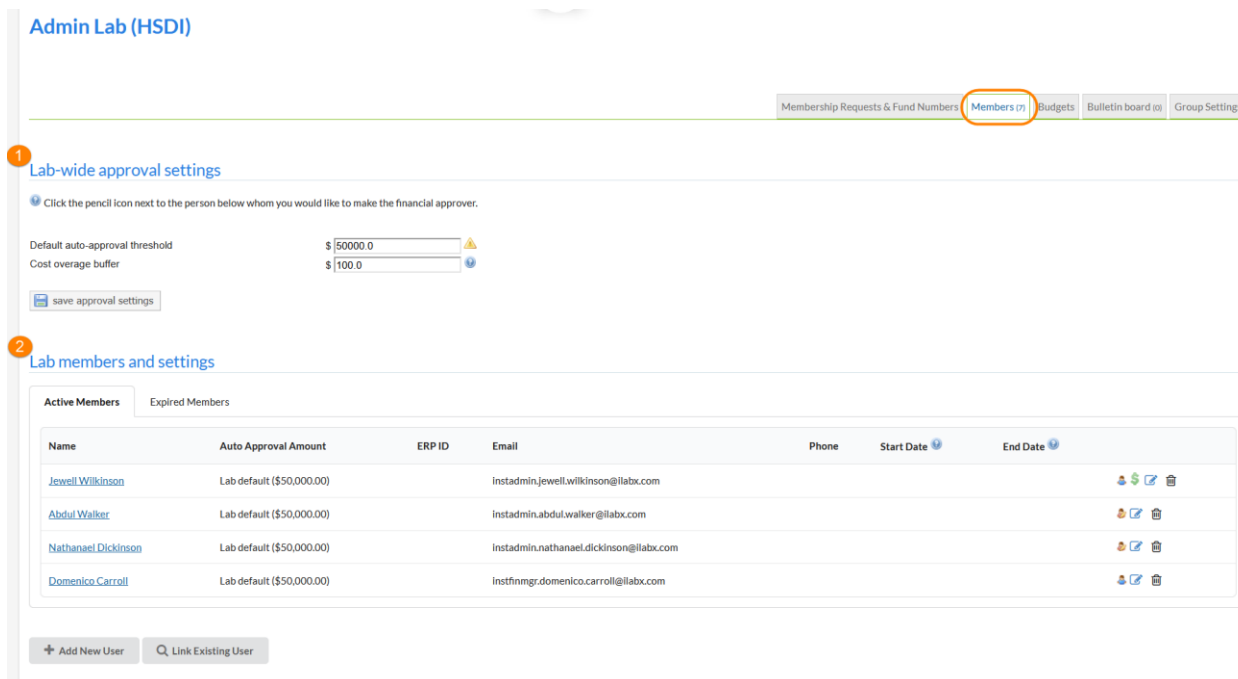
Roles: PI, Lab/Group Manager

In the Members tab you can set financial auto-approval thresholds, add new users and manage current memberships to your group.

- Layout of Members tab
- Set approval thresholds
- Manage memberships

Layout of Members Tab

The layout of the *Members* tab is illustrated below:



Admin Lab (HSDI)

Membership Requests & Fund Numbers **Members (7)** Budgets Bulletin board (0) Group Settings

1 Lab-wide approval settings

Click the pencil icon next to the person below whom you would like to make the financial approver.

Default auto-approval threshold \$ 50000.0 ⚠

Cost coverage buffer \$ 100.0 ⓘ

save approval settings

2 Lab members and settings

Active Members Expired Members

Name	Auto Approval Amount	ERP ID	Email	Phone	Start Date	End Date
Jewell Wilkinson	Lab default (\$50,000.00)		instadmin.jewell.wilkinson@labx.com			
Abdul Walker	Lab default (\$50,000.00)		instadmin.abdul.walker@labx.com			
Nathanael Dickinson	Lab default (\$50,000.00)		instadmin.nathanael.dickinson@labx.com			
Domenico Carroll	Lab default (\$50,000.00)		instfinmgr.domenico.carroll@labx.com			

+ Add New User 🔍 Link Existing User

1. Lab-wide approval settings: Set the financial approval thresholds for the group altogether.
2. Lab member and settings: Add/remove users from the group and manage their current memberships.


Set Approval Thresholds


Financial approvals are required from lab administrators when the cost of the service requests submitted by the members exceeds the auto-approval threshold. You can adjust your lab threshold in the Lab-wide Approval Settings section:

Lab-wide approval settings

Click the pencil icon next to the person below whom you would like to make the financial approver.

Default auto-approval threshold 

Cost overage buffer 

 save approval settings

- Default auto-approve threshold: The maximum cost of a service request that can be automatically approved. In the example above, a service request can have a price of up to \$500 to receive auto-approval.
- Cost overage buffer: The amount that a service request can go over the original agreed-upon cost before a notification is sent to the lab administrators. In the example above, a service request cost can exceed up to \$100 of the initial price before requiring financial re-approval.

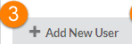
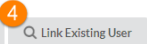
Manage Memberships

The Lab Members and Settings section allows you to add/remove members from the group and manage the existing memberships.

Lab members and settings

Active Members | Expired Members

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date
iLab Team	Lab default (\$0.00)		n/a	thellab@ilabx.com			
Rick Grimes	Lab default (\$0.00)		n/a	jojo21206@live.com	555-555-5555		

1. Member icons:

- Role (person icon): Hover your mouse over this icon to display the role of the user. When blue, this icon is identifying PIs and Members. The yellow version of the icon will represent Lab Managers.
 - Financial contact (dollar icon): This icon indicates that the user is also the lab financial contact and will receive all e-mail notifications requiring the lab administrator's attention. The PI or any additional Manager can still approve pending requests. It also lists the user as a financial contact for Core Staff, so they can be more easily communicated when needed.
 - Edit member (pencil icon): Allows you to edit the membership settings of any member (see item 2 below).
 - Remove member (red X icon): Remove the user from the lab. Note that this does not delete their account from the system.
2. Edit member: When you click on the 'edit pencil' icon, you will be able to adjust:

Edit membership

Person Information

Email

Institutional e-mail is preferred

Phone number

Group Information

Auto Approval Amount

Association Information

Permission

 Can order? Core Financial Contact?

Start Date 

End Date 

- **Email:** iLab communications for this user are sent to this e-mail address. (Changing this will not affect their e-mail used to access iLab).
- **Phone number:** Contact phone number for the user.
- **Auto-approval Amount:** Overrides the lab default auto-approval threshold and sets different limits per member, at your discretion.
- **Permission:** This drop-down specifies the role of the lab member, i.e. Member, Manager or Principal Investigator.
- **Can order?:** This setting applies to iLab's Materials Management module and indicates that this member can order supplies. Typically, not enabled for core facility users.

- **Core Financial Contact?:** Email notifications for the lab are sent to this member.
- **Start Date:** The start date for the user as a member of the lab. If set to a point in the future, the user will not be associated with the lab until the start date. Used to set up lab members in advance, without giving them access until their start date. When left empty, the user will be active immediately.
- **End Date:** The end date for the user as a member of the lab. After that, the user will be removed from the lab and will not be allowed to pay for services using any lab fund. When left empty, the membership will have an indefinite duration.

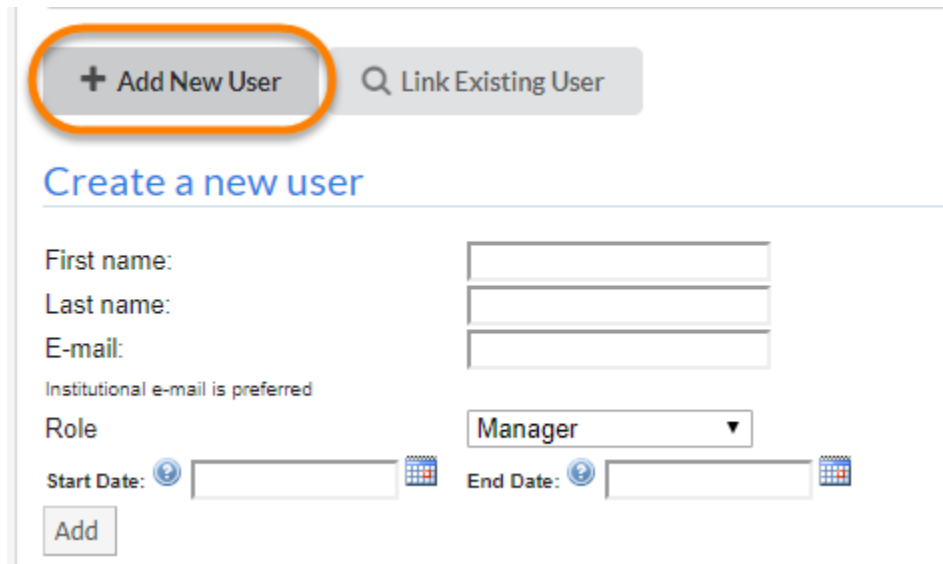
Note: For expired users, outstanding charges will still follow the normal billing process. To review or reactivate expired memberships, click on the 'Show expired memberships' link (only visible when your lab has any expired memberships).

Lab members and settings

Active Members **Expired Members**

Name	Auto Approval Amount	ERP ID	Default FS	Email	Phone	Start Date	End Date
iLab Team	Lab default (\$0.00)		n/a	theilab@ilabx.com			
Rick Grimes	Lab default (\$0.00)		n/a	jojo21206@live.com	555-555-5555		

+ Add New User 🔍 Link Existing User



+ Add New User 🔍 Link Existing User

Create a new user

First name:

Last name:

E-mail:

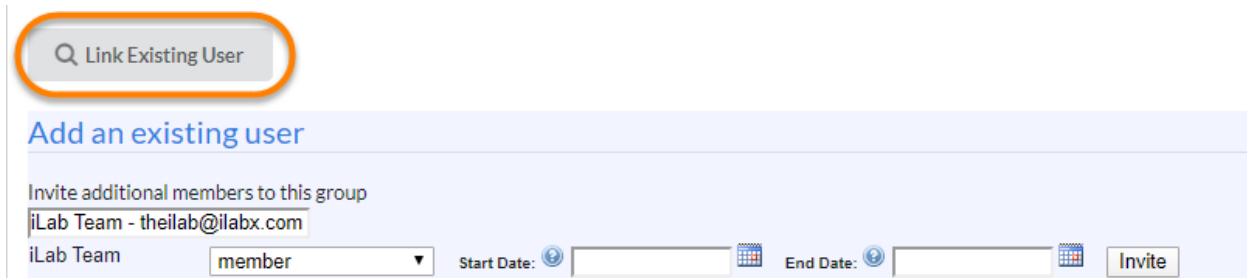
Institutional e-mail is preferred

Role:

Start Date:

End Date:

3. Add new user: Create a new user and add them to your lab. Complete the fields as described above under Edit member and click 'Add'. The user will receive a welcome e-mail containing instructions and their login information.



🔍 Link Existing User

Add an existing user

Invite additional members to this group

iLab Team - theilab@ilabx.com

iLab Team Start Date: End Date:

4. Link existing user: Add an existing iLab user to your group. Type their name in the search field, select the user from the search results, adjust their role, start and end date fields, when applicable, and click 'Invite'.

Budgets

Roles: PI, Lab/Group Administrator

The Budgets tab provides tools for the PI or group manager to receive alerts based on a member's core-level spending. By creating a *budget*, you can track how much researchers in your lab have spent against each core and receive an email notification when spending approaches the budget. Note that budgets cannot be used to enforce spending limits in the system.

- Create a budget
- Track and monitor spending

Create a Budget

To create a new budget, click on the "Add a new budget" button.

Core and Service Center Budgets

For	Interval Period	Start Date	End Date	Budgeted \$ Amount	Budgeted \$ Total	Recent Spend	Current Spend	Alerts Active?
<div style="border: 1px solid orange; border-radius: 10px; padding: 2px 10px; display: inline-block;"> + Add a new budget </div>								

A new budget entry will open up:

For	Interval Period	Start Date	End Date	Budgeted \$ Amount	Budgeted \$ Total	Recent Spend	Current Spend	Alerts Active?
Spending by a member Every member	Monthly	Mar 1, 2016	Sep 1, 2016	0.00				

Who should receive alerts about overspent budgets?

Name	Receive budget alerts?
Sample PI	<input type="checkbox"/>
Sample Manager	<input type="checkbox"/>

✔ Save changes

- **For:** This defines for whom you are creating the budget. You may select *Spending by a member*, *Spending at a core*, and *all spending*. If you select *Spending by a member*, the drop-down box to the right will display all members of the lab. Select the appropriate member. If you select *Spending by a core*, the drop-down box to the right will display all cores for which you are able to create a

budget. Select the appropriate core. If you select all spending, the drop-down box to the right disappears and you can set an overall budget for your lab spending.

- **Interval Period:** This defines the time period for which the budget will be created. You may select Weekly, Monthly, Quarterly, or Custom. If you select Custom, you will set a budget for a single period of time and not intervals.
- **Start Date/End Date:** Defines when the budget should begin and end.
- **Budgeted \$ Amount:** Will define the amount budgeted per interval.
- **Budgeted \$ Total:** This will display the total budgeted amount across for the entire period of time defined.
- **Recent Spend:** This will display a graphical representation of the proportion spent relative to the Budgeted Total (i.e. across the entire period of time)
- **Current Spend:** This displays spending in the current interval
- **Alerts Active?:** When you click on the *Alerts Active?* link, a new window displays. This window displays every financial contact within the lab. Check the box next to their name if you would like them to receive notifications when budgets are nearly met. Once you have made your selection, click save changes, and then click the X to exit the window. You can pause alerts by clicking on the pause button once administrators are set up to receive alerts.
- **Save** (disk icon): Save the current budget
- **Save and clone** (clipboard icon): Save this budget and create an exact copy.
- **Delete** (red "X" icon): Delete this budget

Track and Monitor Spending

Once budgets have been set, you can go back to the *Budgets* tab and see spending from your lab members at any time. View the Recent Spend graph and Current Spend percentage to gauge the budget spending. Once spending gets close to a budget, a notification will be sent to users selected for Alerts.

Group Settings

Roles: PI, Lab/Group Manager

The Group Settings tab of a Lab/Group is used to define general lab information, define a primary contact and set invoice preferences.

- General lab information
- Communication settings

General Lab Information

Click on the "edit" link to update the lab's general information:

General Lab Information

[add to my favorites](#) | [edit](#)

Name: Sample Lab
My relationship: administrator

You will be able to edit the following information:

Name:
Core: Proteomics Facility (F)

Objectives:

Orderable?:
yes ▼

Sharing options:
stealth ▼

- **Name:** Name of the lab/group
- **Objective:** Define an objective for your lab/group

- **Orderable?:** Used by iLab's requisitioning module.
- **Sharing options:** Used by iLab's requisitioning module.

Communications Settings

You may edit the primary contact for this group by clicking on "click to edit". If there is already a contact for this group and you wish to change it, hover over the name until the red pencil displays. Then, click the pencil to open the drop down box and select a different member.

Communication Settings

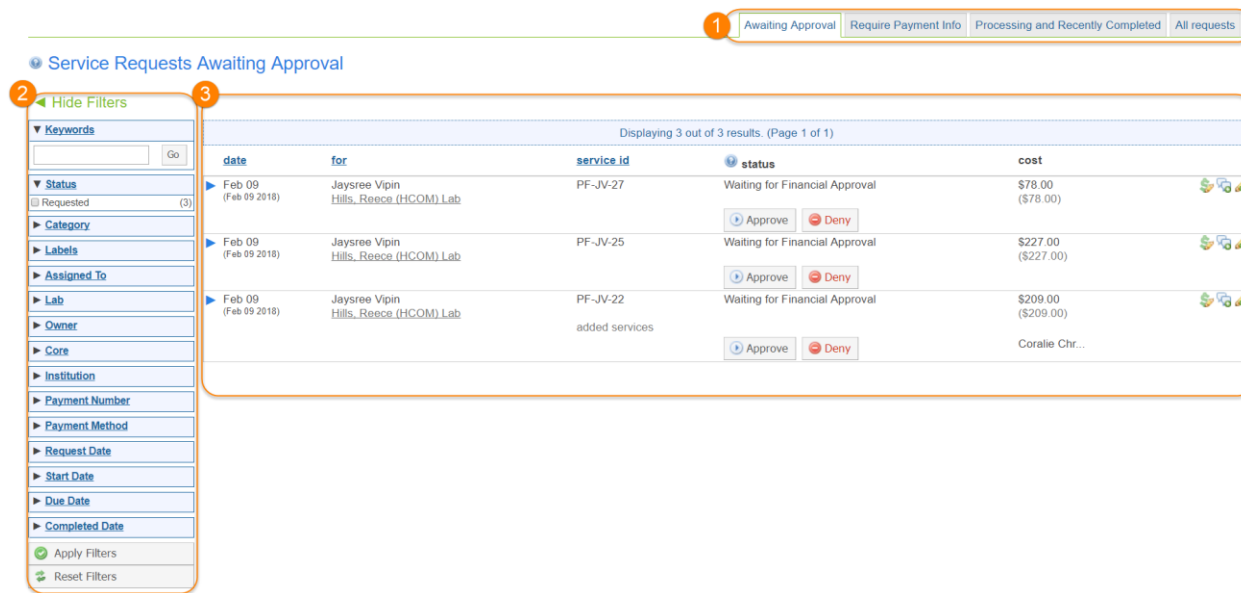
Lab Primary Contact:

View Requests

Roles: PI, Lab/Group Manager

The View Request interface is accessible from the left-hand side navigation. It provides a comprehensive way for PIs and Group Managers to view all requests submitted by their labs/groups.

The View Requests interface consists of three main panels:



1 Awaiting Approval | Require Payment Info | Processing and Recently Completed | All requests

2 Service Requests Awaiting Approval

3 Hide Filters

date	for	service id	status	cost
Feb 09 (Feb 09 2018)	Jaysree Vipin Hills, Reece (HCOM) Lab	PF-JV-27	Waiting for Financial Approval Approve Deny	\$78.00 (\$78.00)
Feb 09 (Feb 09 2018)	Jaysree Vipin Hills, Reece (HCOM) Lab	PF-JV-25	Waiting for Financial Approval Approve Deny	\$227.00 (\$227.00)
Feb 09 (Feb 09 2018)	Jaysree Vipin Hills, Reece (HCOM) Lab	PF-JV-22 added services	Waiting for Financial Approval Approve Deny	\$209.00 (\$209.00) Coralie Chr...

Status tabs: These tabs provide access to requests based on their status:

- **Awaiting Approval:** Use this tab to quickly see all requests that require your approval. Click the button 'Approve' if you agree with the costs and services proposed, or 'Deny', if you disagree. View the Request Approval Workflow article for more details.
- **Require Payment Info:** This tab shows only requests that are currently missing payment information. Use the dollar-icon on the right-hand side of each request to update the fund/payment Information.
- **Processing and Recently Completed:** All requests that are processing normally and do not require actions are shown on this tab

- **All requests:** Shows all of your requests, irrespective of status. This tab is best used in conjunction with the filters, discussed below.
-

Filters: Click on Hide Filters / Show Filters at the top of this panel to hide/show the filter interface. Requests can be filtered based on all of the listed criteria by clicking on the desired criterion to show the list of available options, clicking the appropriate check boxes, and then choosing "Apply Filters" at the bottom of the filters panel.

Note that only criteria options that apply to the current set of requests are available. For example, if you are on the "Awaiting Approval" tab (see above), only the criteria that apply to those requests can be selected.

To reset all filters, click on the "Reset Filters" button at the bottom of the filters panel.

Request Details: The main panel shows all of the (filtered) requests. Each request can be expanded by clicking on the triangle on the left-hand side.

If there are any pending approval actions, they can be performed by clicking on the corresponding button in the Status column. The three icons on the right-hand side of each request allow you to change the Fund/Payment Information (dollar icon), add a comment (text bubbles), and perform various edit request actions (pencil with green arrow).

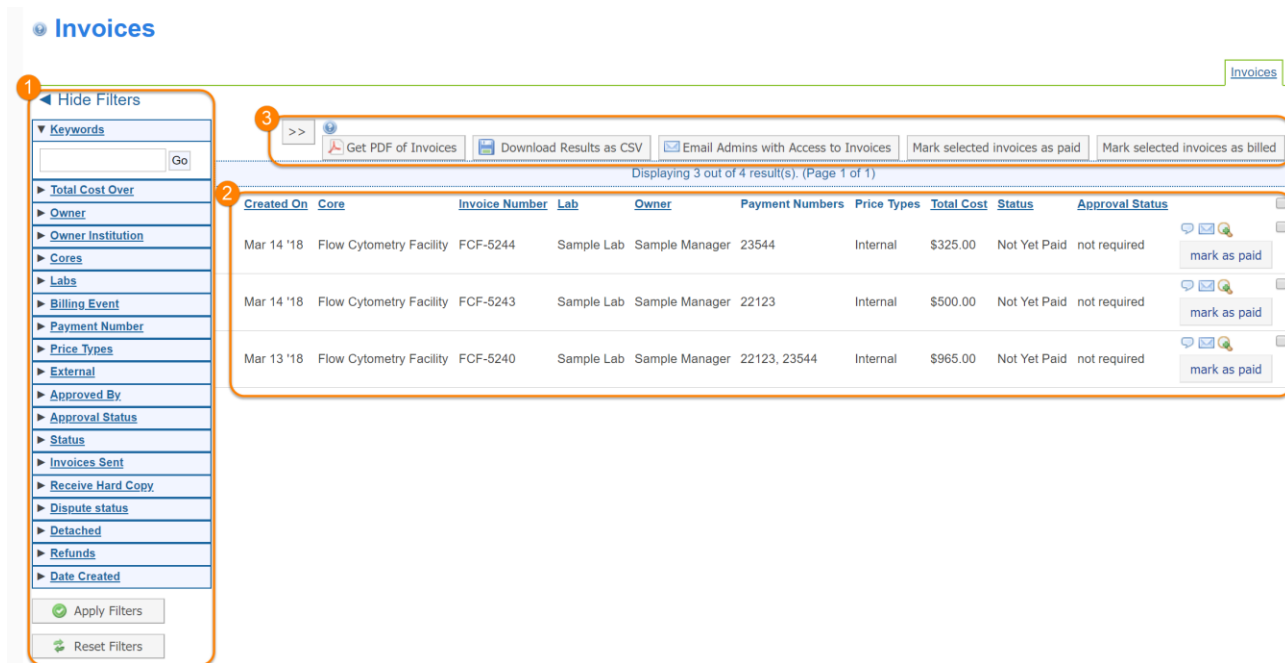
Invoices

Role: All users

The *Invoices* view is accessible from the left-hand side navigation. It provides a comprehensive way for all users to review their invoices. Note that this interface has a number of features only available to Administrators and Staff.

Invoices Layout

The layout of the *Invoices* interface is illustrated below:



The screenshot shows the 'Invoices' interface with three numbered callouts:

- 1. Filter:** A 'Hide Filters' panel on the left containing various filter categories like 'Keywords', 'Total Cost Over', 'Owner', 'Cores', 'Labs', etc., with 'Apply Filters' and 'Reset Filters' buttons at the bottom.
- 2. Invoice list:** A table displaying invoice details. The table has columns: Created On, Core, Invoice Number, Lab, Owner, Payment Numbers, Price Types, Total Cost, Status, Approval Status, and a 'mark as paid' button for each row.
- 3. Bulk actions:** A toolbar at the top right of the table area containing buttons for 'Get PDF of Invoices', 'Download Results as CSV', 'Email Admins with Access to Invoices', 'Mark selected invoices as paid', and 'Mark selected invoices as billed'.

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Status	Approval Status	
Mar 14 '18	Flow Cytometry Facility	FCF-5244	Sample Lab	Sample Manager	23544	Internal	\$325.00	Not Yet Paid	not required	mark as paid
Mar 14 '18	Flow Cytometry Facility	FCF-5243	Sample Lab	Sample Manager	22123	Internal	\$500.00	Not Yet Paid	not required	mark as paid
Mar 13 '18	Flow Cytometry Facility	FCF-5240	Sample Lab	Sample Manager	22123, 23544	Internal	\$965.00	Not Yet Paid	not required	mark as paid

- Filter:** The filter panel
- Invoice list:** This panel displays all (filtered) invoices.
- Bulk actions:** Actions that can be performed on all selected invoices

Apply Filters

You can filter invoices on a wide variety of other attributes using the *Filters* panel. If the filter panel is not visible, click on the "Show filters" link in the upper-left. To use filters, use the black arrow to the left of each category to expand the filter you would like to search on. Then, select from the available entries.

◀ Hide Filters

▼ Keywords
<input type="text"/> <input type="button" value="Go"/>
▶ Total Cost Over
▶ Owner
▶ Owner Institution
▶ Cores
▶ Labs
▶ Billing Event
▶ Payment Number
▶ Price Types
▶ External
▶ Approved By
▶ Approval Status
▼ Status
<input type="checkbox"/> Not Yet Paid (3)
<input type="checkbox"/> Paid (1)
▶ Invoices Sent
▶ Receive Hard Copy
▶ Dispute status
▶ Detached
▶ Refunds
▶ Date Created

<input checked="" type="button" value="Apply Filters"/>
<input type="button" value="Reset Filters"/>

With the appropriate criteria selected, click "Apply Filters" and your refined list will display. You can also reset all filters with the "Reset Filters" button.

View Invoice Information

The main panel of the *Invoices* interface shows the (filtered) invoices.

Displaying 3 out of 4 result(s). (Page 1 of 1)

Created On	Core	Invoice Number	Lab	Owner	Payment Numbers	Price Types	Total Cost	Status	Approval Status	
Mar 14 '18	Flow Cytometry Facility	FCF-5244	Sample Lab	Sample Manager	23544	Internal	\$325.00	Not Yet Paid	not required	<input type="checkbox"/> mark as paid
Mar 14 '18	Flow Cytometry Facility	FCF-5243	Sample Lab	Sample Manager	22123	Internal	\$500.00	Not Yet Paid	not required	<input type="checkbox"/> mark as paid
Mar 13 '18	Flow Cytometry Facility	FCF-5240	Sample Lab	Sample Manager	22123, 23544	Internal	\$965.00	Not Yet Paid	not required	<input type="checkbox"/> mark as paid

1. **Invoice selection:** Each invoice has a check-box at the far right that can be toggled to include/exclude it for subsequent bulk actions (see below). The very top check-box (at the height of the panel header) can be used to select/deselect all visible invoice at once.
2. **Invoice attributes:** Lists various attributes of the invoice:
 - **Created on:** The date the invoice was created.
 - **Core:** The core that issued the invoices for services rendered
 - **Invoice Number:** The number assigned to the invoice.
 - **Lab:** The lab that is responsible for payment of the invoice.
 - **Owner:** This is the person responsible for this invoice in the lab (the *Primary Contact* defined in the Group Settings)
 - **Payment Numbers:** The various funds used to pay for charges on this invoice
 - **Price Types:** Each service will be charged at a specific price type, depending on the nature of the customer (in some case overridden by the Core administrator).
 - **Total Cost:** Total amount charged on the invoice.
 - **Status:** The status of the invoice (*Paid* or *Not Yet Paid*).
 - **Approval Status:** Certain institutions require that the lab formally approves the invoice. In these cases, the approval status is listed in this column. Otherwise, it will show as *not required*.
3. **Invoice actions:** Various actions that can be performed for individual invoice:

- **Notes and comments** (text bubble icon): The pop-up panel lets you add and edit notes and comments. The *Notes for Core* panel is only visible to core staff and can be used for internal notes. The *Notes* panel is used for general notes visible to both core and others. The *Comments* panel can be used for back and forth conversation between all users who have access to the invoice.
- **E-mail** (letter icon): **For Core Administrators and Staff only**. Send the invoice by e-mail to selected recipients, together with an optional message:

x

Send Email


To: Invoice owner Financial managers Researchers
 Sample Manager Sample PI Sample Member 2

Subject: iLab: Your invoice FCF-5244 from Help Site Documentation Institution (Flow Cytometry Facility)

Body: Message (optional):

File ▾ Edit ▾ Insert ▾ View ▾ Format ▾

B *I* U ↶ ↷ ≡ ≡ ≡ Paragraph ▾ Font Sizes ▾ *I*x

 **Insert/edit video**

p

Click this link to access this invoice within your iLab account:
<https://my.ilabsolutions.com/purchasing/show/5244>

send me a copy of this email

- **View invoice detail** (magnifying glass icon): Open up the full invoice
- **Mark as paid / billed** (button): **For Core Administrators and Staff only**. Clicking "Mark as paid" will change the status of the invoice to *Paid*.